

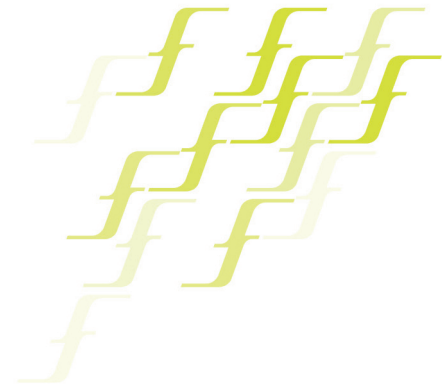


Nefos Mobile

User Manual and Configuration Guide

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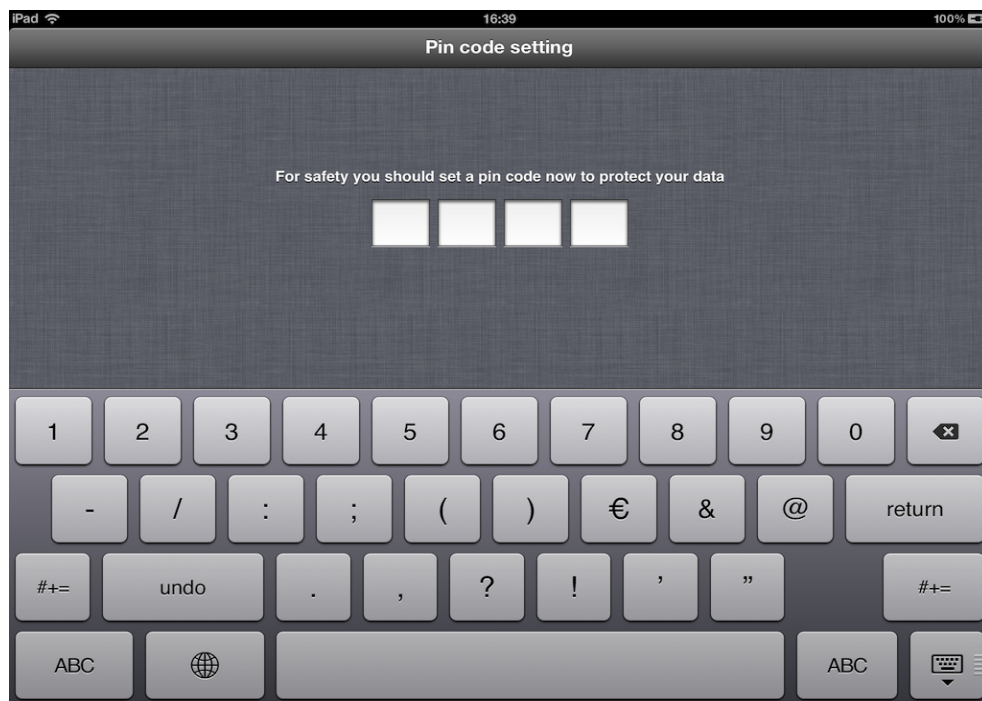


1. How to use the Nefos Mobile App

Thank you for your interest in the Nefos Mobile App. This manual describes both the functionality of the mobile App and possible user interactions, but also the configuration, which is done in your Salesforce environment by your designated Salesforce administrator.

1.1 First launch – setting the PIN code

On the first launch the “Nefos Mobile” App will ask you to set-up a PIN code. The PIN code is 4 digits long.



Please enter 4 numbers for the PIN twice. The “Enter PIN view” disappears. On any other launch, the App will ask you to provide the once defined PIN code. In case of 5 wrong retries, all offline data will be deleted and the App will be reset.

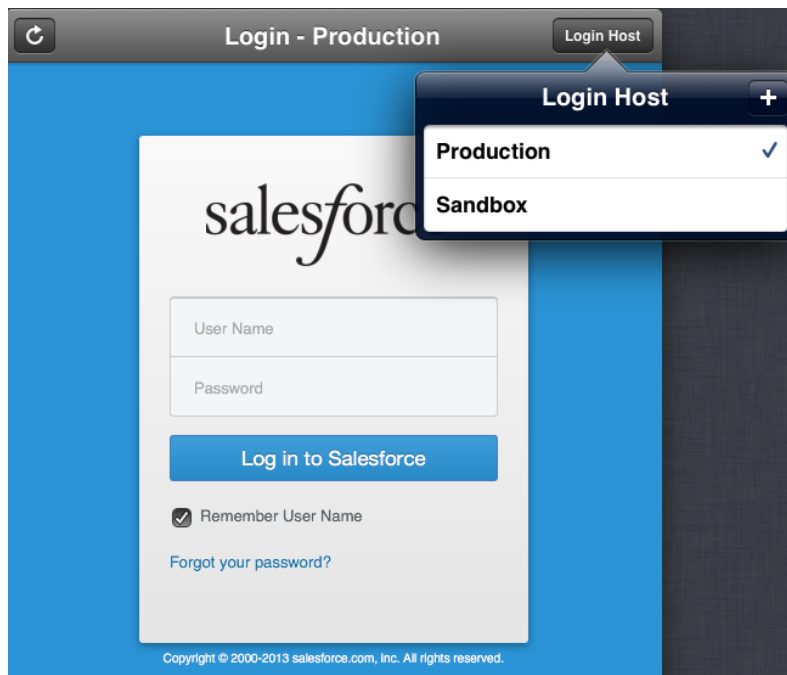
Tooltips When you login to Nefos Mobile, you will see Help Tooltips with hints or explanation, for your next steps by working with Nefos Mobile. You can hide the Tooltips by clicking on them. If you have hidden the tooltips, and you wish to see them again, go to Settings /Tooltips, and turn on “Show help tooltips again” (see section 2).



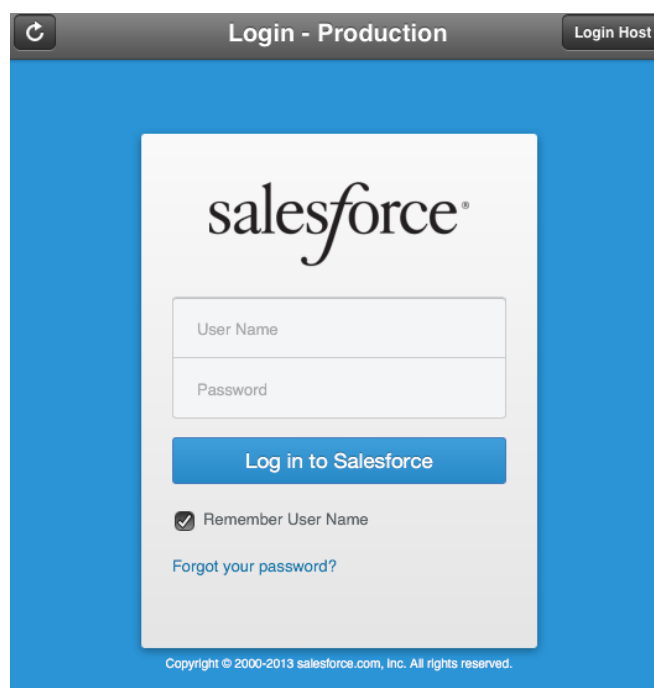
1.2 Starting Salesforce sync

If you are launching the App for the first time or you are not logged in into your Salesforce environment yet, the App will ask you to login to Salesforce. After the login, the initial synchronization with Salesforce will be performed and your data will be stored offline in the Nefos Mobile App.

Select your Salesforce Login Host (Production or Sandbox):

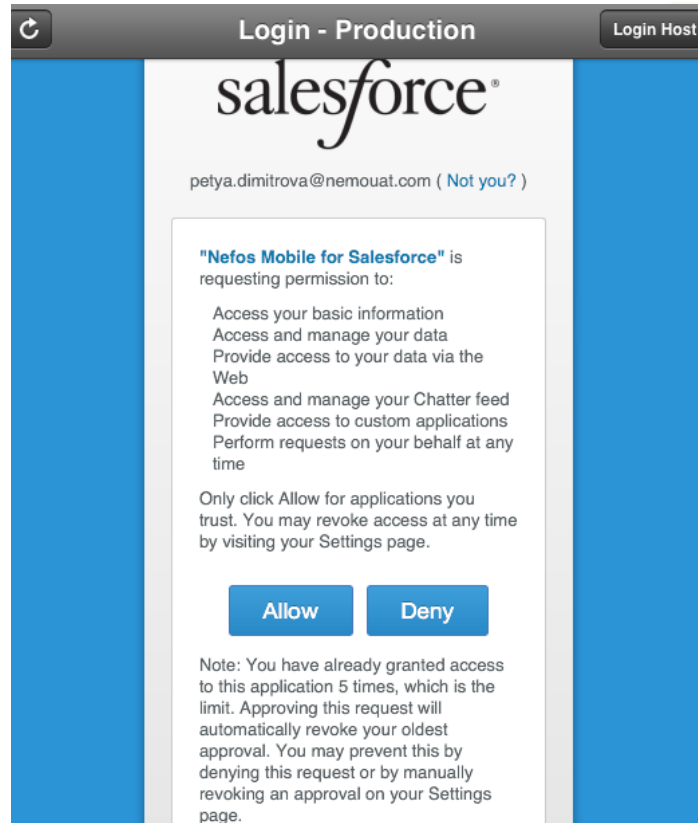


Provide your user name and password:



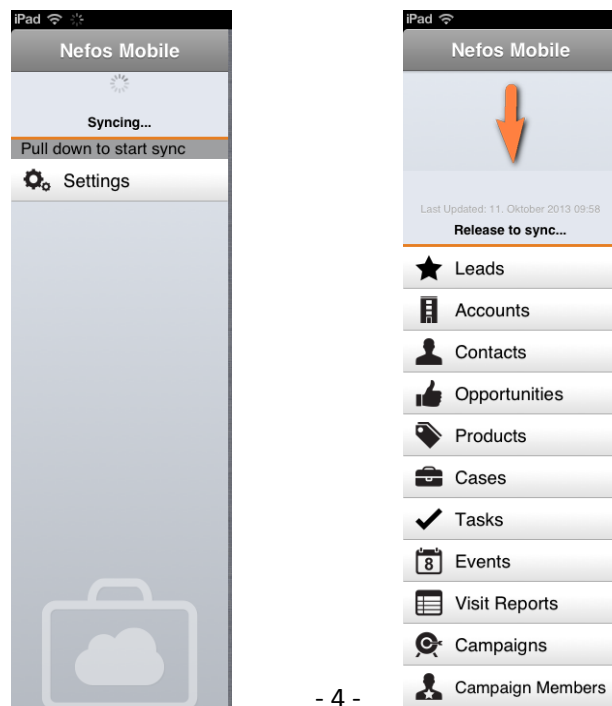


The “Nefos Mobile for Salesforce” is requesting permission to:... page appears. Please tap the “Allow” button. The Salesforce page disappears and the app starts the sync with Salesforce.



As soon as the sync is finished, the objects configured in the Salesforce environment will be displayed in the Main Menu on the left.

In order to trigger sync again, upload your local modifications to Salesforce and download latest data from Salesforce at some later point of time, please pull down the menu on the left side of the App.

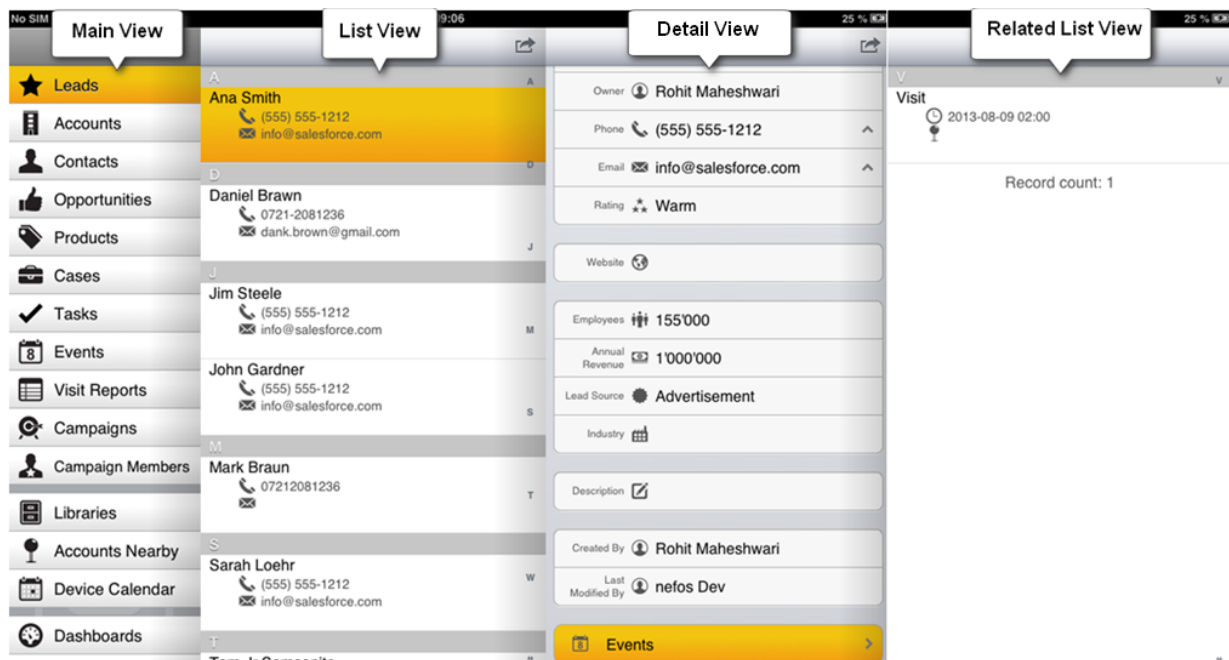




1.3 Main-, List – and Related Lists View

If data has been synchronized for offline usage, it can be accessed and viewed in the Nefos Mobile App. There are currently 4 different types of views:

- **The Main View** includes all Objects, which are synchronized with Salesforce.
- **The List View** includes all records from a current selected Object.
- **The Detail View** displays the record selected in the list view.
- **The Related List View** includes all records from a selected related Object.



1.4 Interacting with records

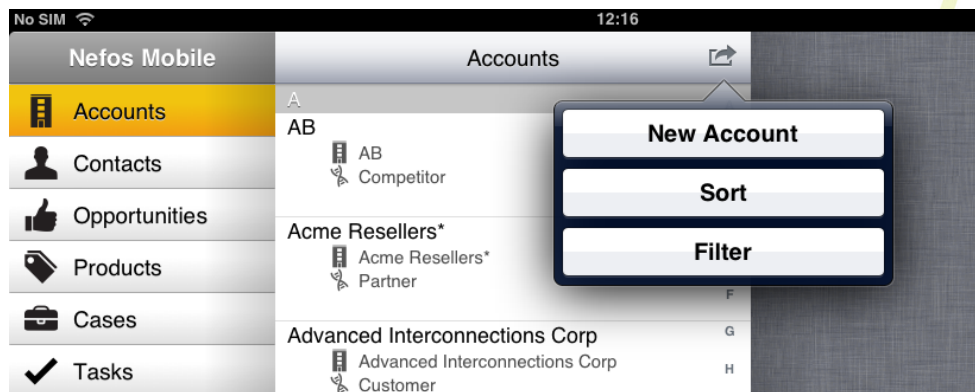
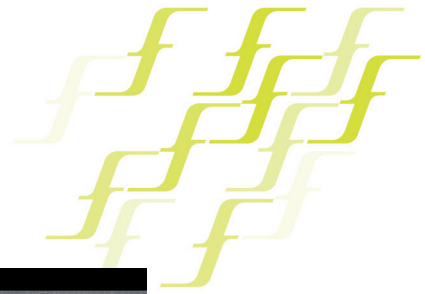
Records, which contain e-mail, phone or URL- data e.g. Account, Contact or Lead

- E-mail: Tap on the e-mail address to open the e-mail window and send an e-mail to the contact straight from the Nefos Mobile App.
- Call: Type the phone number, to call the contact – works on iPhone and on iPad using Skype
- URL: Type the URL-link to open it in a web browser inside the app.

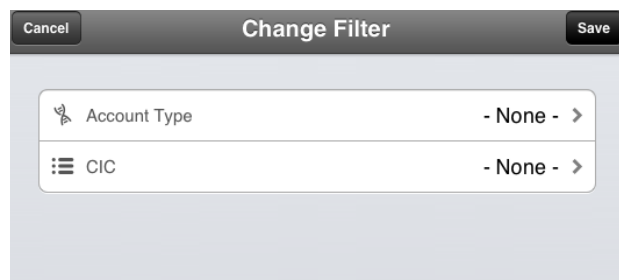
1.5 Sorting and Filtering

With Nefos Mobile you can choose, which data you want to see, for instance if you would like to see only Accounts from a specific Account Type, or to sort your Accounts by their Account Type.

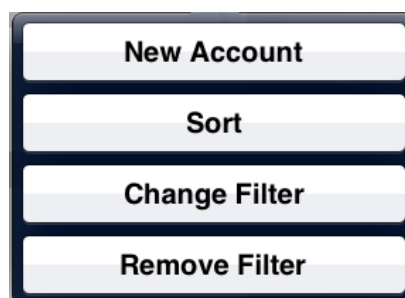
If you want to see only specific data, you can go to the List View Menu (on the top right) and choose to sort or to filter your data.



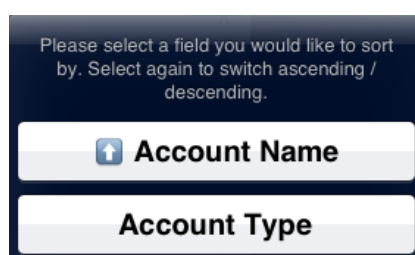
When you tap the “Filter” button, you see all fields you configured in the Nefos Mobile configuration in Salesforce as filterable. You can currently filter by fields of type Picklist and Lookup.



If you want to change the filter or remove it, tap the buttons “Change Filter” or “Remove Filter” from the List View Menu.



You can tap on the “Sort” button in order to sort the list view by the corresponding field. You can sort by any field that is configured as sortable in the Nefos Mobile configuration in Salesforce and is shown in the list view.





If you sort by a field of type date (e.g. Opportunity Close Date), you will see a column on the right of the List View (please see the picture below with the red square) displaying the year and month. If you tap on one entry in this column the list will scroll to that year and month.

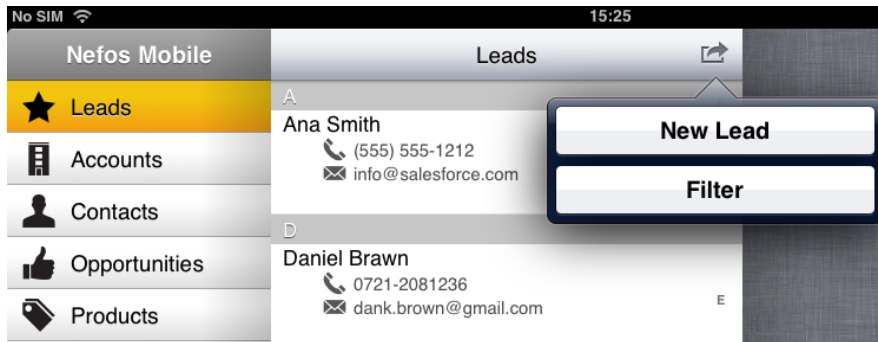
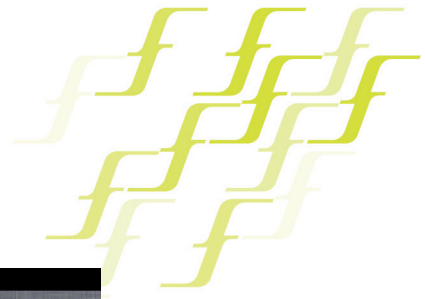
If you want to see the total number of records in your list, you need to tap the “#” Symbol, visible at the bottom of the column on the right.

Nefos Mobile		Opportunities	
★ Leads	2011-04	Global Media - 50K	2011-04
Accounts		○ Closed Won	
Contacts		2011-04-01	2011-06
Opportunities		Global Media - 500K	
Products		○ Closed Won	
Cases		2011-04-01	2013-08
Tasks		2011-06	2013-09
Events		Global Media - 40K	
Visit Reports		○ Negotiation/Review	
Campaigns		2011-06-02	2013-10
Campaign Members		Global Media - 100K	
Libraries		○ Negotiation/Review	
Accounts Nearby		2011-06-02	2013-11
Device Calendar			2014-08
Dashboards		2013-08	
		Multimedia- 150K	
		○ Prospecting	
		2013-08-06	2014-10
		Avacon- 250K	
		○ Qualification	
		2013-08-15	2014-11
		2013-09	
		Oliver Rüber-	
		○ Prospecting	
		2013-09-30	2082-08
			#

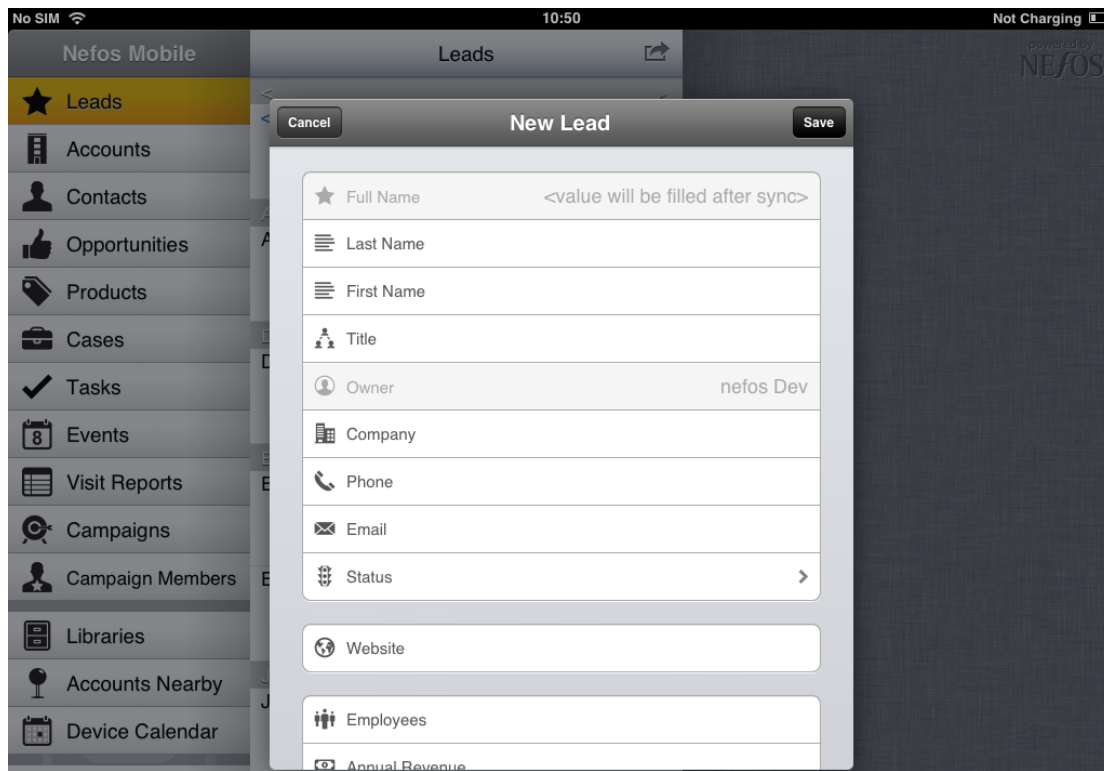
If you sort by a field of type text (e.g. Account Name), you will see in the column on the right the first letter of the field. To jump to a specific Account starting with a specific letter tap on that letter in this column.

1.6 Create, Edit, Clone and Delete a record

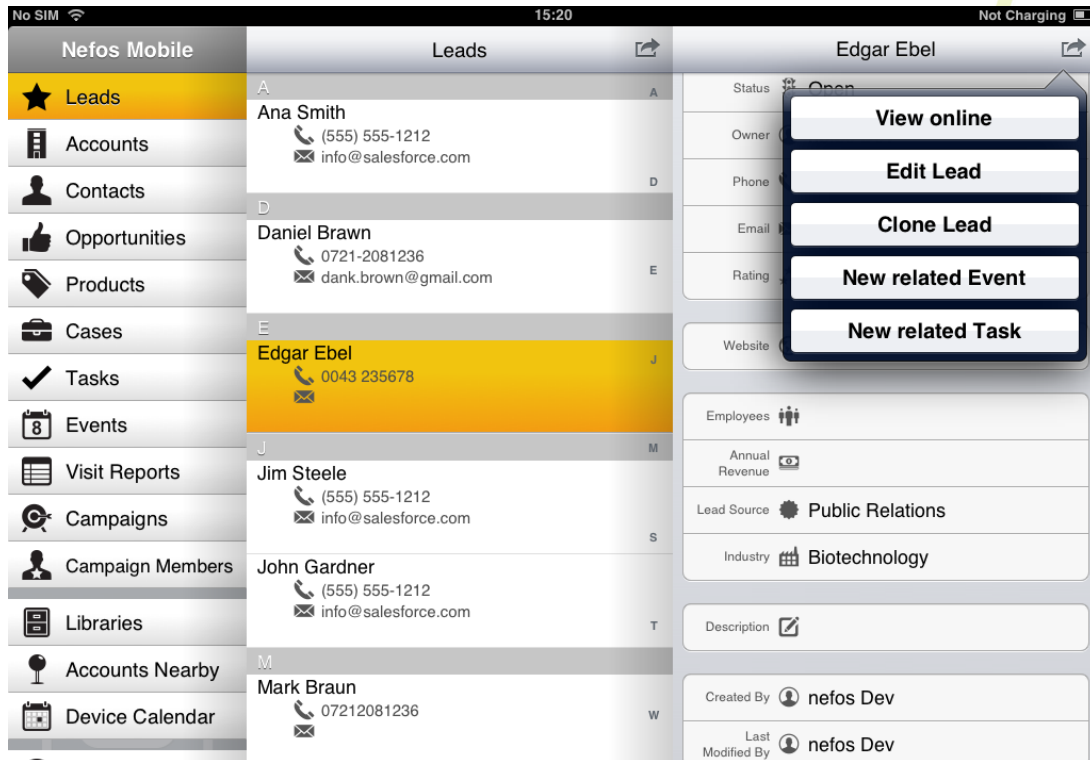
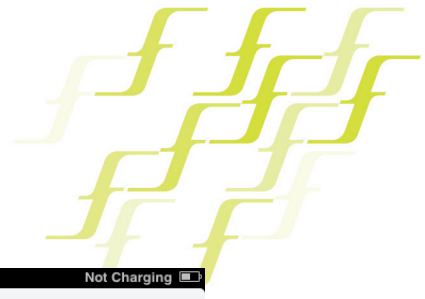
To create a new record, choose an object and tap in the List View Menu the button “New [Object Name]”.



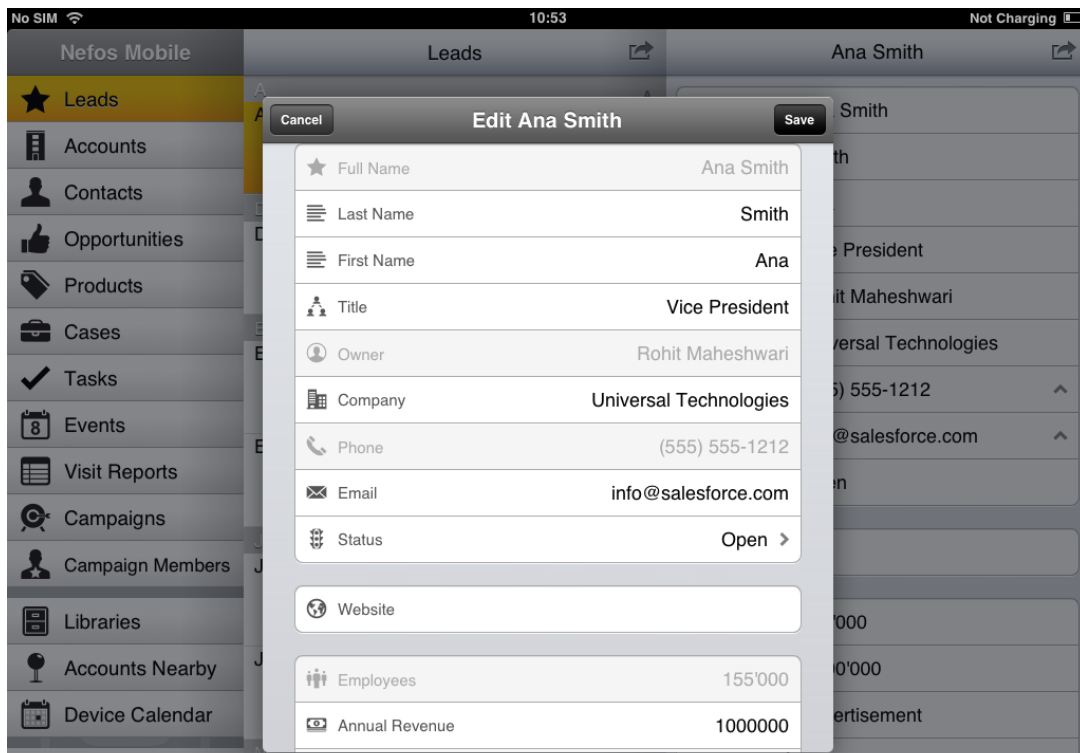
A window opens and you can enter the required information, and tap on Save.



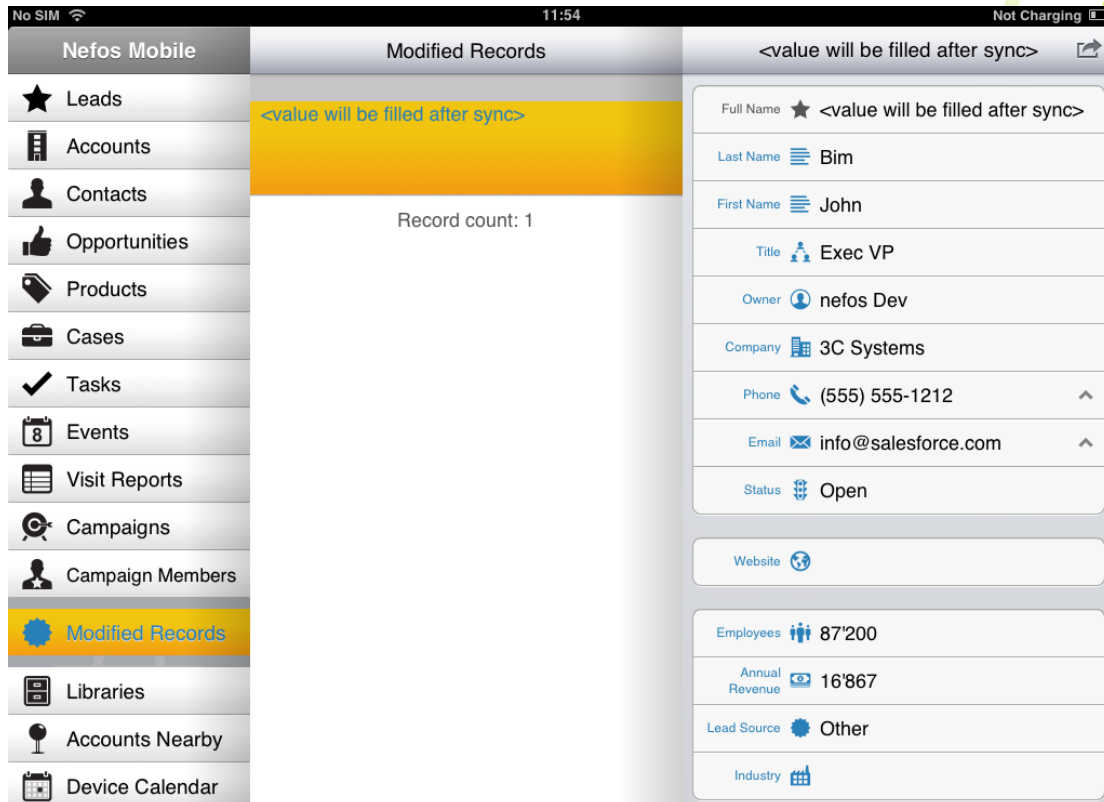
To edit or clone a record, tap on an object name in the main menu, to go to the list view and select the record you want to edit. To edit this record go to the menu icon in the top right corner of the detail view and tap on “Edit Record” or “Clone Record”. A window with the record data opens where you can edit the data and save the changes.



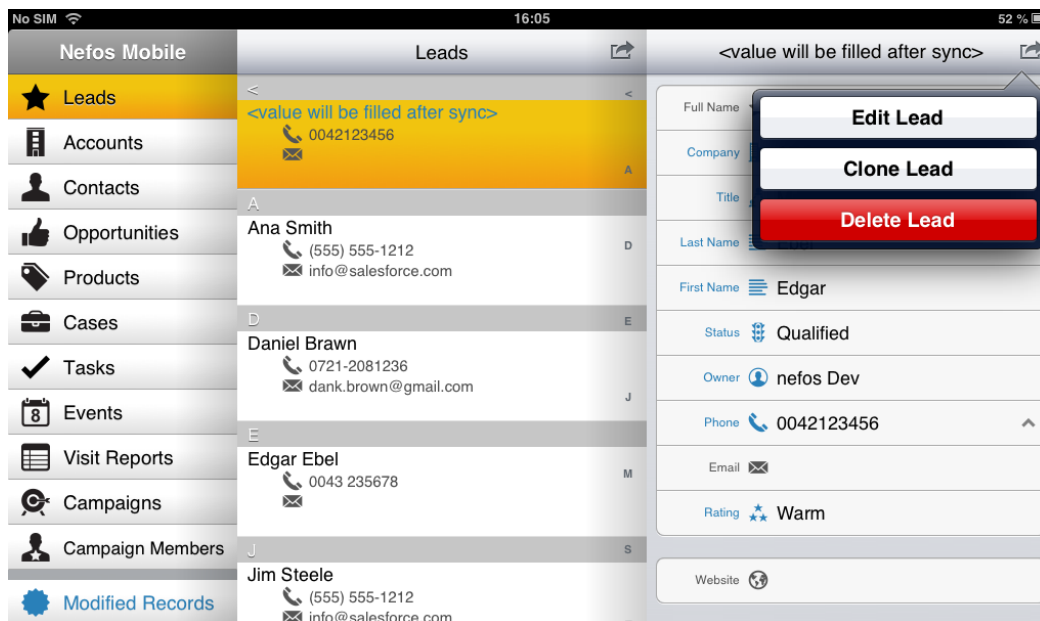
From this menu you can also create a new related record e.g. Event or Task.



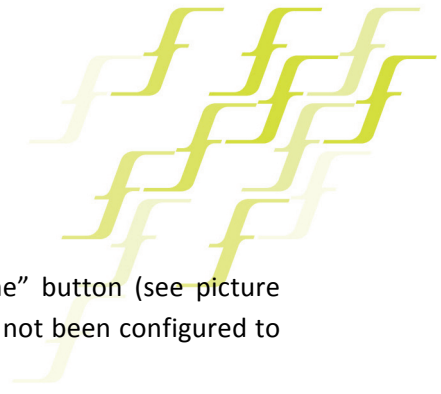
You can find newly created records and modified records in the main menu under the row named "Modified Records". When you sync, these changes will be uploaded to Salesforce.



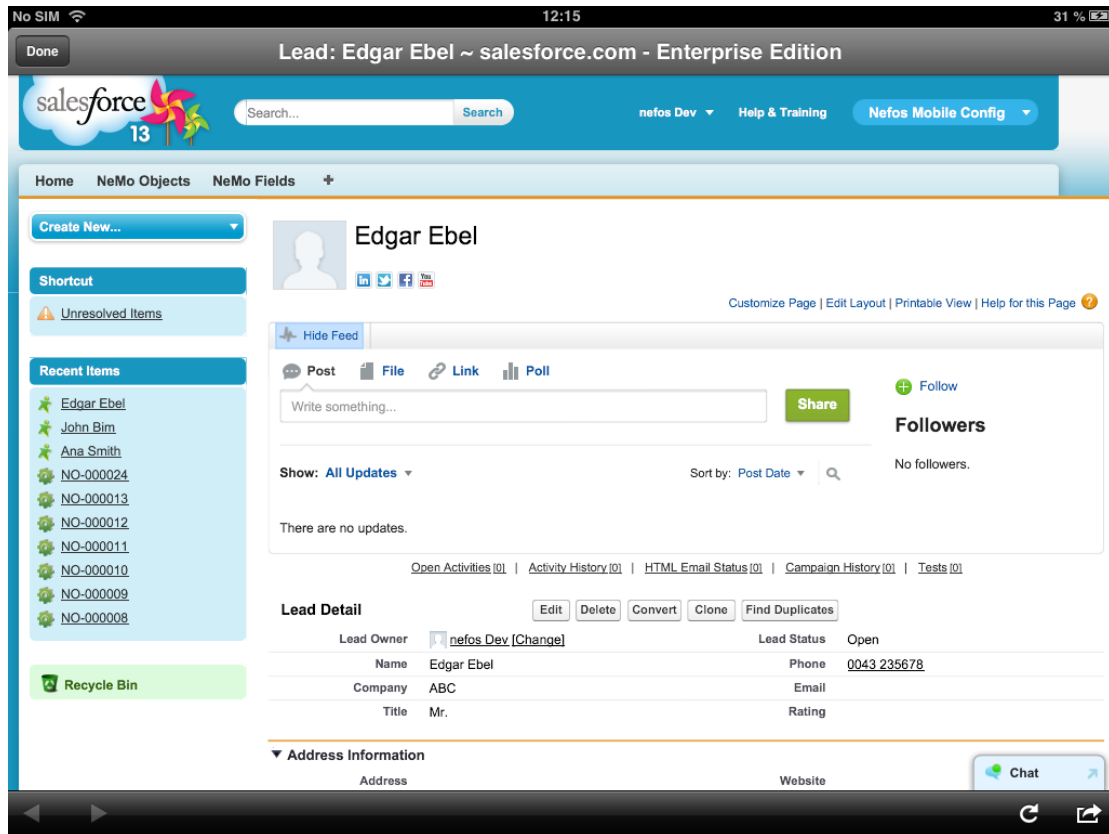
You can **delete a record** on the iPad or iPhone only if the record was created in the Nefos Mobile app and not yet synchronized to Salesforce.



Please notice – if you logout in the Nefos Mobile app after creating, editing or cloning a record without syncing with Salesforce, the changes will be lost.



You can **view a record online** in Salesforce when you tap the “View online” button (see picture below). This is useful if you would like to access some information which has not been configured to be synchronized offline on your device.

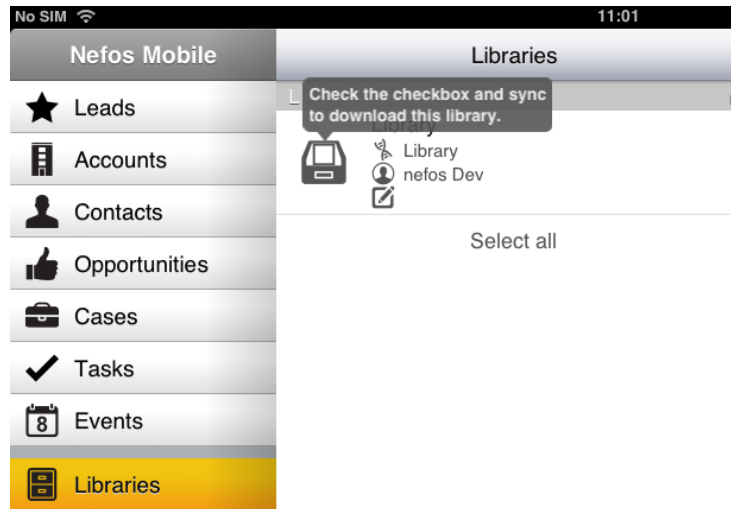
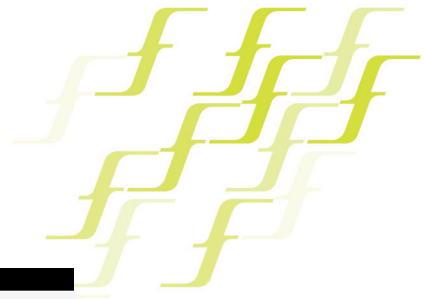


1.7 Nefos Mobile Features

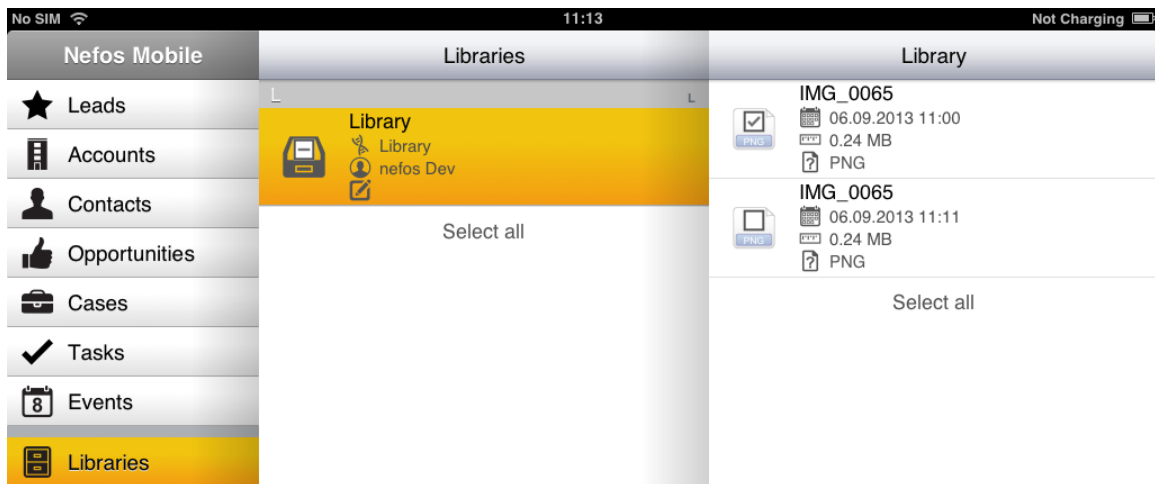
1.7.1 Libraries

In the Library Folder in the Nefos Mobile app you can access all the libraries and files you have permissions in your Salesforce organization.

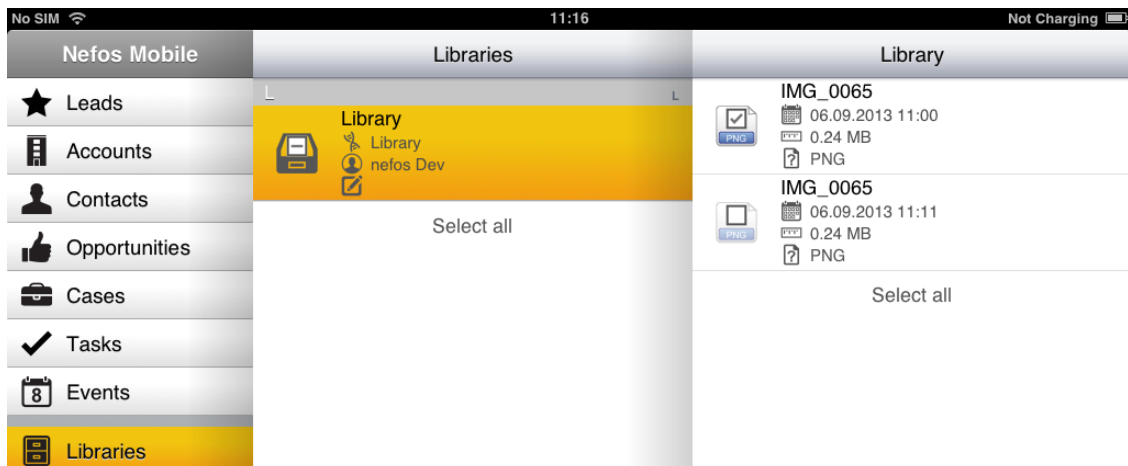
To download a whole library from Salesforce to the Nefos Mobile app you need to check the checkbox in front of the library name and then synchronize with Salesforce once again (by pulling down the menu on the left side, see the picture below).

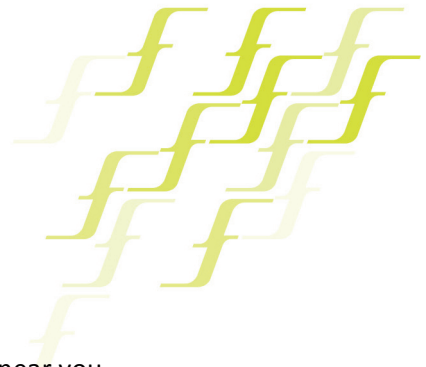


To download only specific file from a Library folder in the Nefos Mobile app, you need to tap on the library that contains the file, check the checkbox in front of the document name and then synchronize with Salesforce once again (by pulling down the menu on the left side).



When the synchronization is finished, you can open the file by tapping on it.

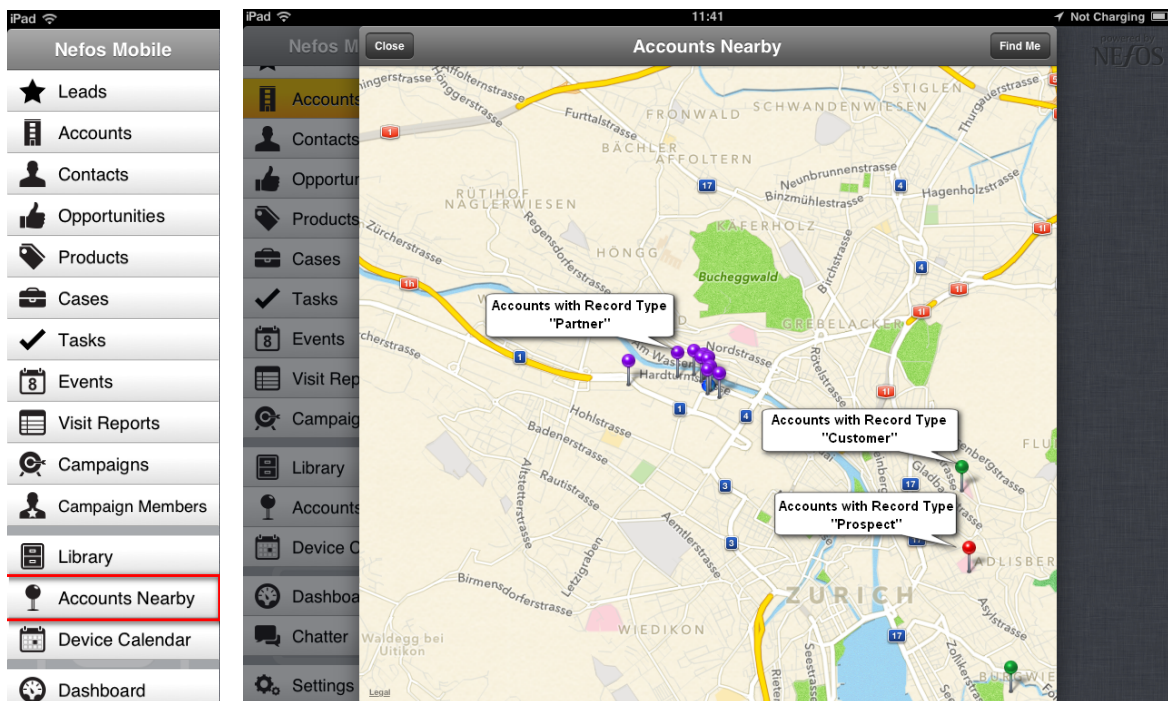




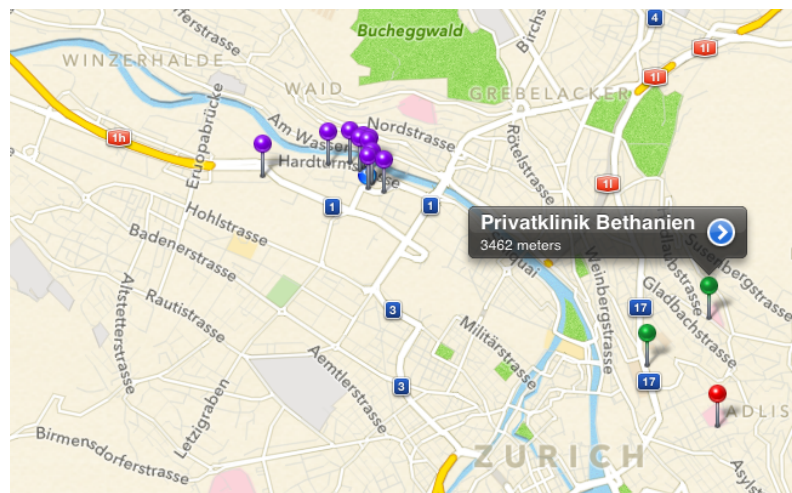
1.7.2 Accounts Nearby

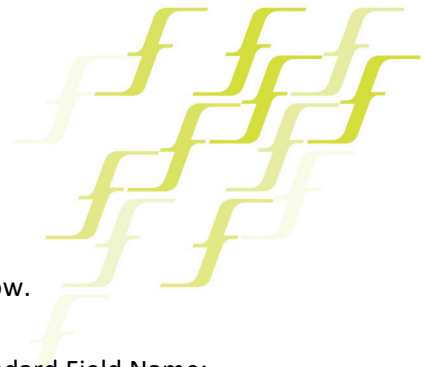
When you tap on Accounts Nearby in the main menu, you can see all Accounts near you.

A window opens and displays all accounts around your position. The Accounts can be marked with different colours, dependent from their account type e.g. accounts with account type “Partner” are marked in purple, accounts with account type “Customer” are marked in green, account with account type “Prospect” are marked in red (see the picture below).



If you tap on a marked account in Account Nearby (e.g. account with account type “Customer” marked in green), you will see the account name, and you can tap on the blue arrow (next to the account name), and navigate to the account record (see picture below).





You can tap on “Find Me” to see your position, or on “Close” to close the window.

Pre-Conditions for using the Account Nearby feature are:

- The latitude (Standard Field Name: BillingLatitude) and longitude (Standard Field Name: BillingLongitude) coordinates of the account address must be available in Salesforce
- This functionality is only available when you are online.

Please define the search and zoom distance around your location in the Nefos Mobile Settings on your Device (see section 2 below).

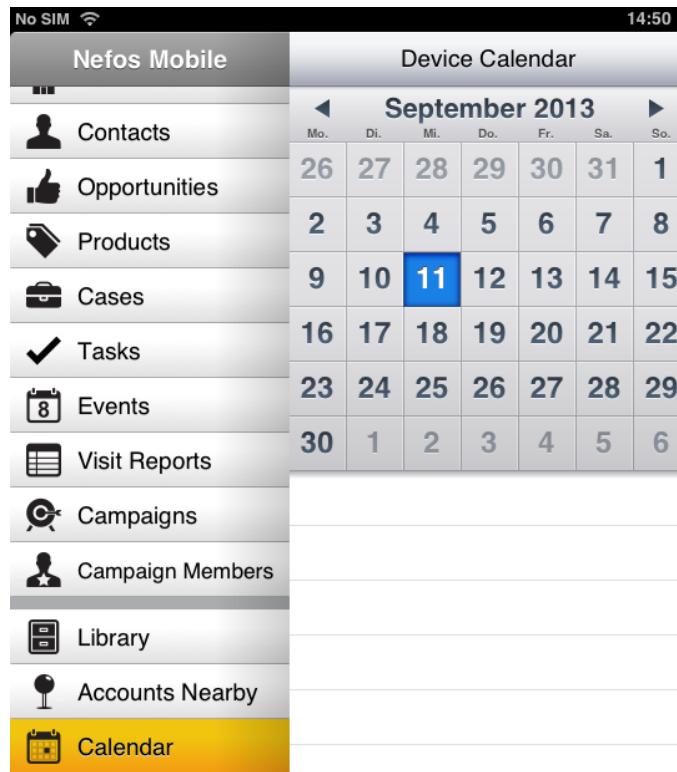
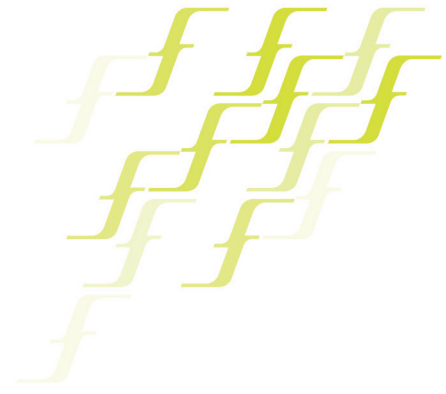
1.7.3 Calendar

You can see the iOS Calendar and events in the Nefos Mobile app and create related Salesforce events.

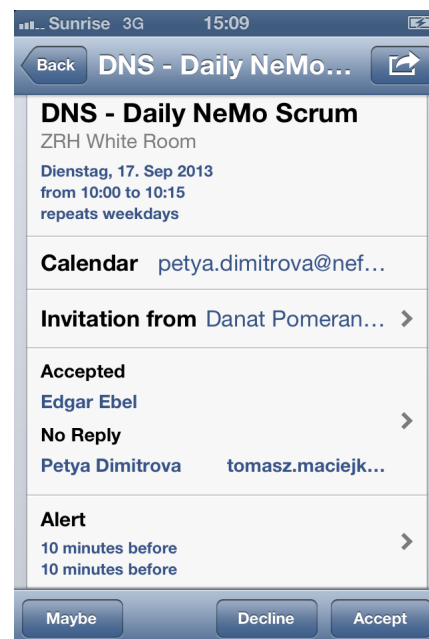
iOS Calendar on the iPad:




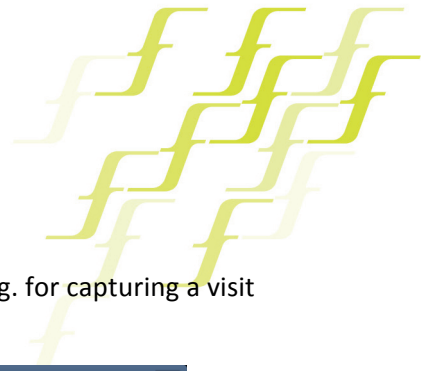
The Nefos Mobile Calendar contains only the events from your default iOS calendar.



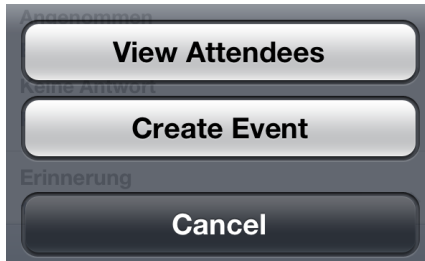
When you go to a specific event on your Nefos Mobile Calendar, you can open the event by tapping on it and review the event details.



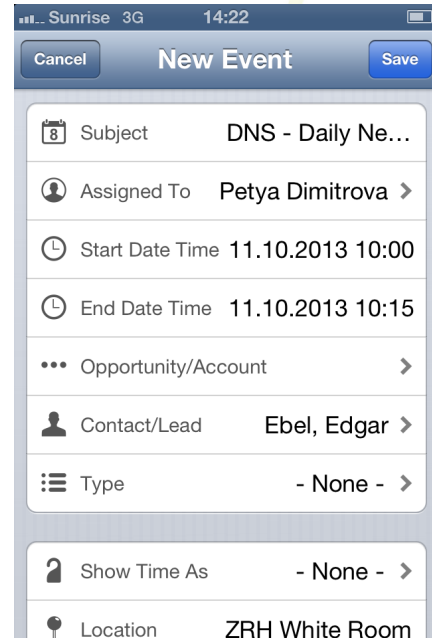
You can reject or accept the event invitation from this page. You can also tap on the menu button on the top right corner , and view the information available in Salesforce for the attendees of this



event, or create an new Salesforce event from this event in the iOS calendar, e.g. for capturing a visit report.





You can define an Event by taping on “Create Event”. After choosing an event attendee, the following window opens:
The information in the new window is copied from the iOS Device Calendar entry.



1.8 Link to standard Salesforce Apps


Both the Dashboard and Chatter buttons open the corresponding standard Salesforce apps if they are installed on the device. If they are not installed, both buttons will open the corresponding online web-page of your Salesforce environment.

1.8.1 Dashboard

When you go to the Dashboard App you can sync the app with Salesforce to get the latest versions of the dashboards in your organization, that you viewed recently and those you are following. To do this, go to the home view and tap . Additionally, you can see when you last refreshed by tapping . Here you can go also to “Help” and you can read more detailed information about, how to use the Dashboard app.

If you lose network access when signed in, you still have offline access to some dashboards and reports you recently viewed on the device.

1.8.2 Chatter

With the Chatter App you can connect with co-workers and share information from your iPad. You can update your status, post to Chatter feeds, attach photos and Salesforce files, mention people in post and comments and much more. For detailed information about the Chatter App features go to the Chatter and tap , go to “Settings” and choose “Help”.



2. Nefos Mobile Settings

You can review your Nefos Mobile settings, when you scroll down in the Main View. Go to Settings to review or change them.

Settings Done

Account - pdd@web.de

Logout Now

Sync status

Last sync date 11.10.2013 09:59

Nefos Mobile Edition Enterprise Edition

Accounts Nearby

Search distance around me 14.0 km

Map zoom distance 8.0 km

Here you can set the search distance around the current position we search for Accounts with geolocation information. You can also set the zoom distance around the current position.

Nefos Mobile Features

Library ☒ ON

Accounts Nearby ☒ ON

Device Calendar ☒ ON

Turn the switch to Off to hide the features in the menu.

Integrated Apps

Dashboard ☒ ON

Chatter ☒ ON

Turn the switch to Off to hide the Apps in the menu.

Tooltips

Show help tooltips again

Get in touch

Email us for support or feedback

Nefos Mobile website

Application information

Version 2.3 (166)

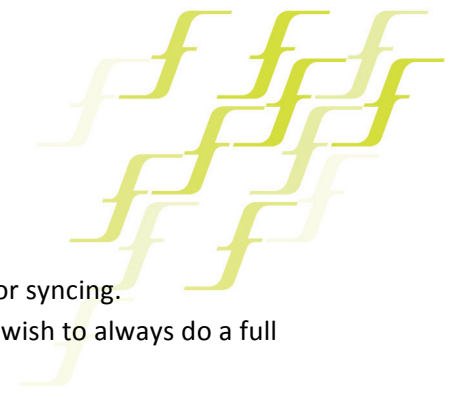
Application ID XlizzWTQifZLpLp

Total synced records 247

Always perform full sync ☐ OFF

Callout Boxes:

- Tap here to Log-out
- See here the last sync date with your organization
- Define and map the zoom distance around you for the feature Account Nearby
- Turn the Switch to Off, if you want to hide the Features Libraries, Accounts Nearby, or Device Calendar in the Nefos Mobile Main Menu
- Turn the Switch to Off, if you want to hide the Apps Dashboards or Chatter in the Nefos Mobile Main Menu
- Tap here to show the help tooltips again
- Contact us for support
- Check your Nefos Mobile Version
- Check your Nefos Mobile Application ID
- Turn the Switch to Off, if want to change from Full sync to Delta Sync



Hint: The first sync will be a full sync so the App gets all the data configured for syncing.

After a full sync finished successfully the next sync will be a Delta Sync. If you wish to always do a full sync, you can turn on “Always perform full sync” (see picture above).

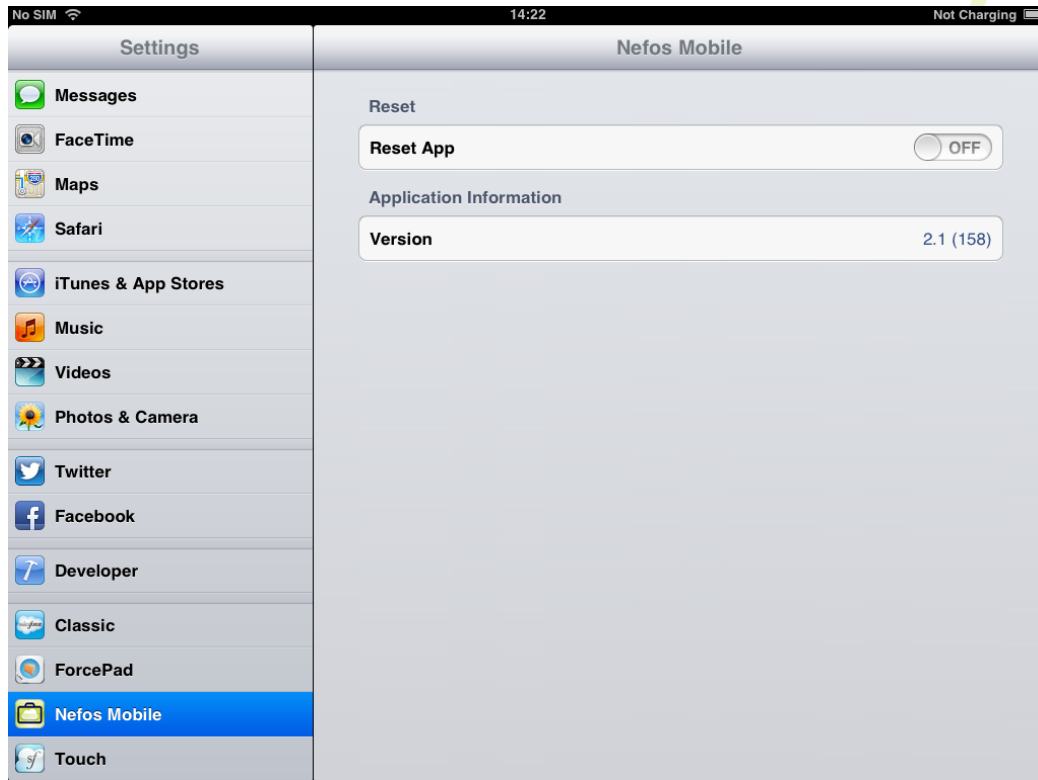
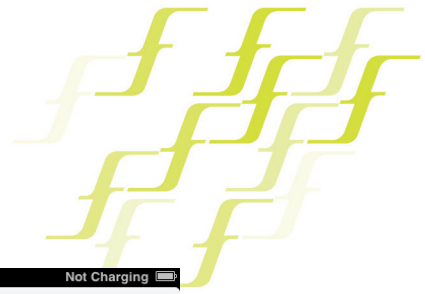
If the configuration in Salesforce changes, the next sync will be a full sync, so the app gets the new configured data.

The Full Sync requires more time than the Delta Sync, because the app syncs all the data with Salesforce. The Delta Sync only syncs the new modified records from Salesforce and the offline modified and created data from the app to Salesforce.

You can reset the App in the iOS Settings App on your iPad or iPhone. Go to your iPad or iPhone Settings.



Navigate in the Main Menu to the Nefos Mobile App and turn the “Reset App” switch to ON. The encrypted local data and the Nefos Mobile App pin code will reset on the next app launch.



3. Nefos Mobile Personal Edition – Standard Configuration

The more precise description of Nefos Mobile editions can be found online here:

<http://www.nefos.com/wp-content/uploads/2013/10/NefosMobileServiceDescription.pdf>

In the Personal Edition, the Nefos Mobile App only supports the standard configuration, which contains predefined Standard Objects and Fields. The following Standard Objects are available in the standard configuration:

Object Name	Description
Leads	A lead, which is a prospect or potential Opportunity.
Accounts	An individual account, which is an organization involved with your business (such as customers, competitors, and partners).
Contacts	A contact, which is an individual associated with an Account.
Opportunities	An opportunity, which is a sale or pending deal.
Cases	A customer issue such as a customer's feedback, problem, or question.
Tasks	An activity or to-do item to perform or that has been performed.
Events	A calendar appointment event.



4. Nefos Mobile Enterprise & Platform Editions – Custom Configuration

The Enterprise and Platform Editions of Nefos Mobile require an installation of an AppExchange package, which will be used for configuration of the App. More details about different editions can be found in this document: <http://www.nefos.com/wp-content/uploads/2013/10/NefosMobileServiceDescription.pdf>

The next chapters describe how the configuration package can be used. It should be performed by the administrator of your Salesforce environment.

4.1 Installing Salesforce AppExchange Package

4.1.1 Install the package

To install the Nefos Mobile Package from the AppExchange:

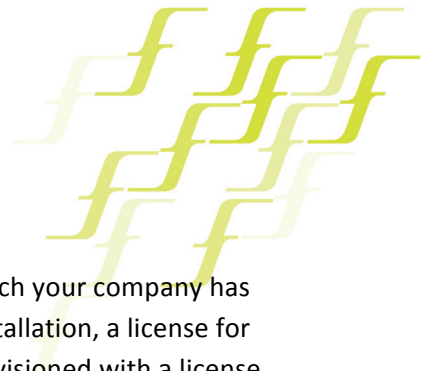
1. Go to Setup -> AppExchange Marketplace and search for the Nefos Mobile App, or go directly to www.appexchange.com, and browse the AppExchange site to find the application.
2. Click “Get it Now” from the application information page.
3. Select your environment type (production or sandbox) and login to the AppExchange with your Salesforce credentials.
4. Click “Install”
5. Choose the option “Grant access to admins only”:
 - a. Object permissions “Read”, “Create”, “Edit”, “Delete”, “View All”, and “Modify All” are all enabled.
 - b. Field level security: Set to visible and editable for all fields
6. Click “Install”.

After the App installation, you will find the new Salesforce application called “Nefos Mobile Config” inside your Salesforce environment, which will contain the tabs “NeMo Objects”, “NeMo Fields” and “NeMo Bulk Configurator”. This step will also create an initial version of the configuration for Nefos Mobile including the default records for “NeMo Objects” and “NeMo Fields”.

4.1.2 Assign users to the package

This step is necessary to provision the configuration package to Salesforce users in your environment.

1. Go to Setup -> Installed Packages
2. Search for the package “Nefos Mobile Configuration”
3. Click on the package Name
4. Click the Button “Manage licenses” to assign Nefos Mobile licenses to users
5. Click “Add Users”, select users from the list and click “Add”



The number of users you can assign to the package is limited by the license which your company has purchased for Nefos Mobile Enterprise or Platform Edition. After a first trial installation, a license for 5 users is granted for a limited time frame of 1 month. Users which are not provisioned with a license and are not assigned to the Nefos Mobile Configuration AppExchange Package can only see the default standard Objects and Fields.

4.1.3 Change the user profile

Change the user profile so that users can access the objects “NeMo Fields” and “NeMo Objects”. Go to Profiles, choose a Profile and go to the section “Custom objects Permissions”. Click “Edit” and give read only access to the profiles of all relevant users.

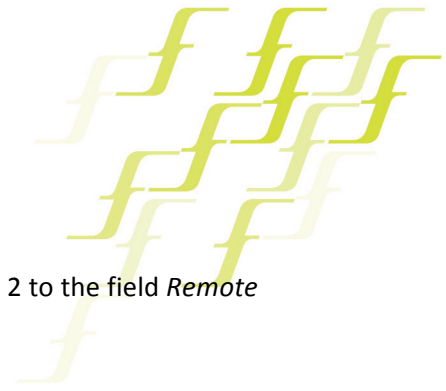
4.1.4 Add Remote Sites

In order to use the Bulk Configurator (see chapter 4.8), the URL of your Salesforce instance needs to be set up as a remote site. The procedure for this is the same for normal and sandbox instances, just follow these steps:

1. Go to *Setup -> Administer -> Security Controls -> Remote Site Settings*
2. Copy the server URL from the address bar of your browser
3. Click on *New Remote Site*

The screenshot shows the Salesforce 'All Remote Sites' page. The browser address bar contains the URL: `https://eu2.salesforce.com/00n?sp1=1&setupid=SecurityRemoteProxy&retURL=%2Fui%2Fsetup%2Fsetup%3Fsetupid%3DSecurity`. The left sidebar shows the navigation menu with 'Remote Site Settings' highlighted under 'Security Controls'. The main content area shows a table of remote sites with one entry: 'eu2' with URL 'https://eu2.salesforce.com'. A 'New Remote Site' button is visible above the table. Red circles and numbers 1, 2, and 3 highlight the 'Remote Site Settings' link, the browser address bar, and the 'New Remote Site' button respectively.

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	eu2	-	https://eu2.salesforce.com	✓	Pomeranets, Dana	25.04.2013 13:42	Birgi, Mehmet	01.10.2013 11:24



4. Enter a name for the remote site and paste the URL you copied in step 2 to the field *Remote Site URL*
5. Click on *Save*

Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy salesforce.com.

Remote Site Edit

Save Save & New Cancel

Remote Site Name eu2

Remote Site URL https://eu2.salesforce.com

Disable Protocol Security ☐ i

Description

Active ☒

Save Save & New Cancel

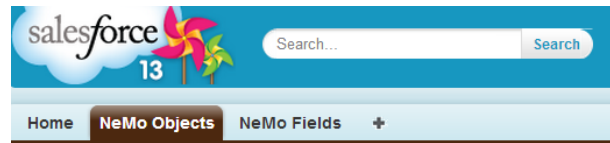
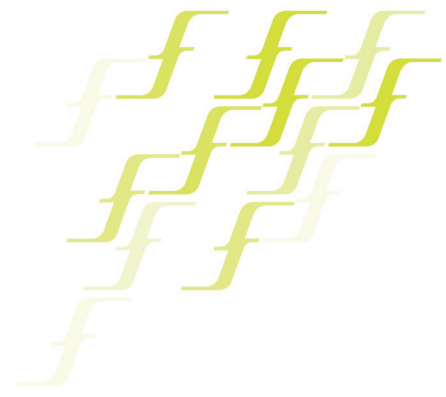
4.2 Synchronize objects and fields with Nefos Mobile

All existing objects in Salesforce can be used in the Nefos Mobile App. Using the checkbox “Synchronize” on every Nefos Mobile Object, we can define, which object to synchronize and to display in the Nefos Mobile app.

NEMO Object Detail		Edit	Delete
Name	Account		
Order	20		
Show in the menu	<input checked="" type="checkbox"/>		
Icon	company-toit.pdf		
Synchronize	<input checked="" type="checkbox"/>		
Created By	nefosDev, 17.09.2012 16:34		

4.3 Create a Nefos Mobile Object

After the Installation of the Nefos Mobile package, go to the App “Nefos Mobile Config” and to the tab “Nefos Mobile Objects”.



Tap the button “New Nefos Mobile Object” and the following window opens:

NeMo Object Edit Help for this Page ?

New NeMo Object

NeMo Object Edit Save Save & New Cancel

Information ! = Required Information

Name	<input type="text"/>	Owner	nefos Dev
Order	<input type="text"/>	Sync Filter	<input type="text"/>
Show in menu	<input checked="" type="checkbox"/>	Editable	<input type="checkbox"/>
Synchronize	<input checked="" type="checkbox"/>	Createable	<input type="checkbox"/>
Icon	<input type="text"/>	Deletable	<input type="checkbox"/>

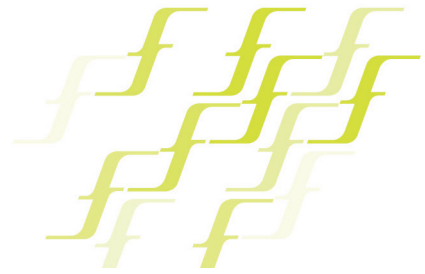
Save Save & New Cancel

Enter the required information in the fields “Name” and “Order”, and add an Icon (see point 4.6). The Name has to be the API Object name. Objects are ordered by their Order number in the Main View of the offline app.

Here you can configure what Nefos Mobile Object should be editable, creatable or deletable in the offline app.

Optionally you can add a sync filter to set which records will be available offline. The sync filter is the WHERE clause you would add to a SOQL query, please find more details below.

Click on Save and review the data of the new Nefos Mobile Object again:



NeMo Object
NO-000011

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

« [Back to List: Custom Object Definitions](#)

[NeMo Fields](#) [5+]

NeMo Object Detail

[Edit](#) [Delete](#) [Clone](#)

Name ?	Visit_Report__c	NeMo Object ID	NO-000011
Order ?	85	Owner	nefos Dev [Change]
Show in menu ?	<input checked="" type="checkbox"/>	Sync Filter ?	CreateDate = TODAY
Synchronize ?	<input checked="" type="checkbox"/>	Editable ?	<input checked="" type="checkbox"/>
Icon ?	visit-report.pdf	Createable ?	<input checked="" type="checkbox"/>
		Deletable ?	<input checked="" type="checkbox"/>
		Last Modified By	nefos Dev, 04.09.2013 16:10

[Edit](#) [Delete](#) [Clone](#)

NeMo Fields

[New NeMo Field](#)

[NeMo Fields Help](#) ?

Login on your iPad or iPhone and synchronize with Salesforce, to see the new Nefos Mobile Object in the Main View.

4.4 Create a Nefos Mobile Field

After you created the new Nefos Mobile Object, tap the button “New Nefos Mobile field” from the new Nefos Mobile Object page.

Enter the required information Name, Section and Order. The new fields are grouped by their section number in the detail view of an object.

With the Order number, the fields are ordered within the same section.

NeMo Field Edit New NeMo Field

[Help for this Page](#) ?

NeMo Field Edit
[Save](#)
[Save & New](#)
[Cancel](#)

Information

NEMO Object

Name ?

Order ?

Icon ?

Section ?

Synchronize ?
☒

Main field ?
☐

Show in list view ?
☐

Editable ?
☐

Filterable ?
☐

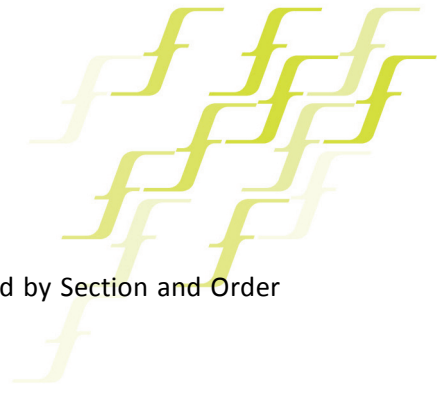
Sortable ?
☐

Save

Save & New

Cancel

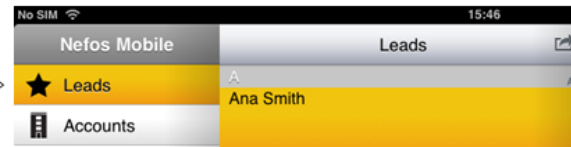
On the field edit page you can also configure which field we use as the Main field in the List view, and which fields to display below the main field in the list view. You can only have one main field in the



List View. If you choose more than one field we display the first field ordered by Section and Order (see the section 4.4).

In Salesforce

In Nefos Mobile

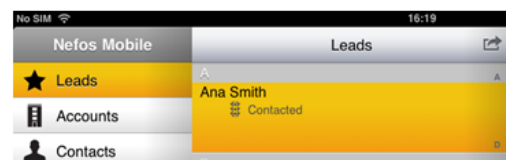


In addition to the Main field you can display up to 3 fields in the list view. If you choose more fields the Nefos Mobile app will display only the first three fields ordered by their Section and Order (see the section 4.4). If you didn't select any fields to be displayed in the List View, and you have selected only a Main Field, you can see only the Main Field in the List View in the Nefos Mobile app (see picture above).

If you have selected in your configuration a Main Field and an additional field you will see the following:

In Salesforce

In Nefos Mobile



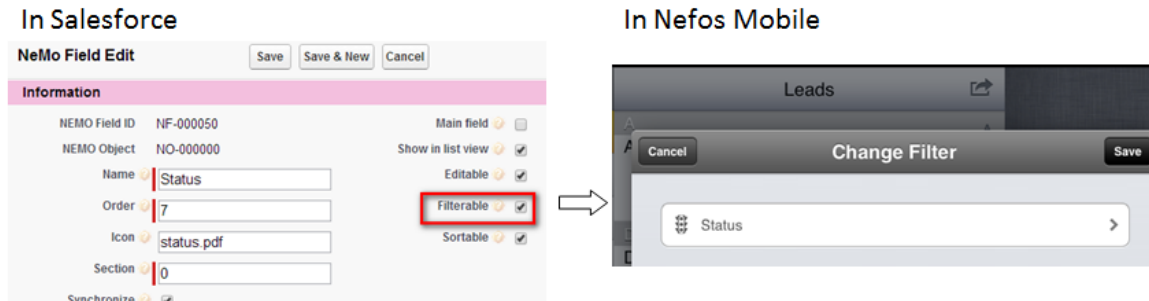
If you configured a field as not editable you will see the field greyed out in the Nefos Mobile app:

In Salesforce

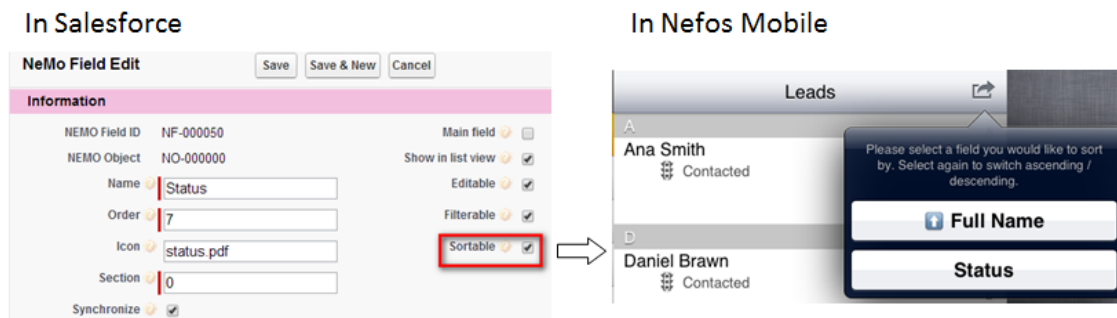
In Nefos Mobile



If you configured a field as filterable you will be able to select it as a filter in the Nefos Mobile app. We currently support picklist and lookup fields as filter fields:



If you defined a field as sortable you will be able to sort by this field from the Sort popup in the Nefos Mobile app. Only the fields shown in the list view can be used for sorting:



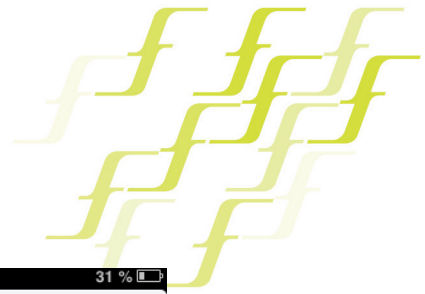
If you have **required fields** in the Salesforce data model, we you need to add them to your Nefos Mobile configuration – otherwise you will not be able to create new records in the mobile app. Please be aware, that required fields which are defined as required on the page layout in Salesforce are not required fields in Nefos Mobile.

4.5 Setting the Section and Order

Section number: Fields are grouped by this number on the detail view of the object.

Order number: Objects and Fields are ordered by this number in a specific section.

The Section- and Order number define also the order of fields selected in the list view. For example, in the next picture the fields Phone and Email are selected to be displayed in the list view. So we can see here the Phone number first (Section 0 Order 6) and then the Email (Section 0 Order 7), because of their Section and Order number setting.



Leads

- Ana Smith** (555) 555-1212, info@salesforce.com
- Daniel Brawn** 0721-2081236, dank.brown@gmail.com
- Edgar Ebel** 0043 235678
- Edgar Ebel** 0042123456
- Jim Steele** (555) 555-1212, info@salesforce.com
- John Gardner** (555) 555-1212, info@salesforce.com

Ana Smith

Full Name ★ Ana Smith (Section 0 Order 0)

Company 🏢 Universal Technologies

Title 👤 Vice President (Section 0 Order 2)

Last Name ≡ Smith

First Name ≡ Ana

Status 📶 Open

Owner 👤 Rohit Maheshwari

Phone 📞 (555) 555-1212

Email ✉ info@salesforce.com

Rating ★★ Warm

Website 🌐 (Section 1 Order 10)

Employees 👥 155'000 (Section 2 Order 20)

Annual Revenue 💰 1'000'000 (Section 2 Order 21)

When you compare your field definition in Salesforce and the section and order in the Nefos Mobile App, you will see the following:

In Salesforce

NeMo Field Detail [Edit] [Delete] [Clone]

NEMO Field ID NF-000088 Main field ☒

NEMO Object NO-000000 Show in list view ☐

Name Name Editable ☒

Order 0 Filterable ☐

Icon star.pdf Sortable ☒

Section 0 Synchronize ☒

NeMo Field Detail [Edit] [Delete] [Clone]

NEMO Field ID NF-000174 Main field ☐

NEMO Object NO-000000 Show in list view ☐

Name Title Editable ☒

Order 2 Filterable ☐

Icon commandchain.pdf Sortable ☐

Section 0 Synchronize ☒

In Nefos Mobile

Ana Smith

Full Name ★ Ana Smith (Section 0 Order 0)

Company 🏢 Universal Technologies

Title 👤 Vice President (Section 0 Order 2)

Last Name ≡ Smith

First Name ≡ Ana

Status 📶 Open

Owner 👤 Rohit Maheshwari

Phone 📞 (555) 555-1212

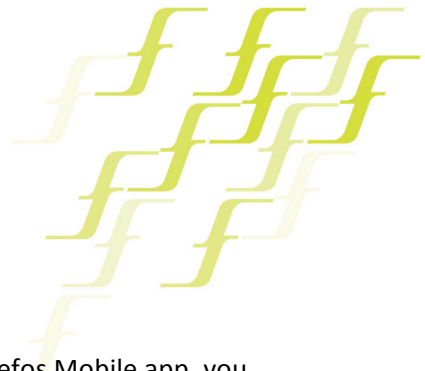
Email ✉ info@salesforce.com

Rating ★★ Warm

Website 🌐 (Section 1 Order 10)

Employees 👥 155'000 (Section 2 Order 20)

Annual Revenue 💰 1'000'000 (Section 2 Order 21)

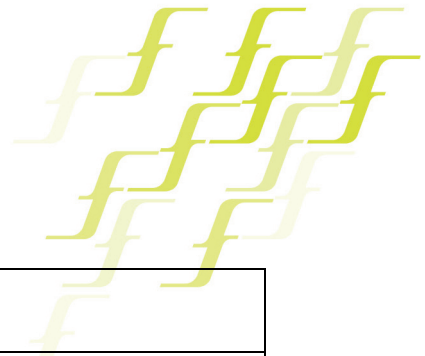


4.6 Setting a Sync Filter

When you don't need to synchronize all the records from Salesforce with the Nefos Mobile app, you can use the Sync Filter field on the Nefos Mobile Object configuration page.

Go to the “Nefos Mobile Config” App in Salesforce, go to the Tab “Nefos Mobile Objects” and choose and Object. Click on “Edit” to add a Sync Filter (see picture above). There are many ways to configure a Sync Filter. Here are some examples:

Nefos Mobile Object	Sync Filter	Description
Lead	IsConverted = FALSE	Don't display in the Nefos Mobile app converted Leads.
Standard or Custom Object	CreatedDate = THIS_YEAR	Display in the Nefos Mobile app only records created this year.
Standard or Custom Object	Active__c = TRUE AND CreatedDate = THIS_YEAR	Display in Nefos Mobile app only records, where the checkbox “Active” is set to true created this year.
Standard or Custom Object	CreatedById = '\$currentUser'	Display in the Nefos Mobile app only the records created the current user.
Standard or Custom Object	CreatedById = '\$currentUser' AND CreatedDate = THIS_YEAR	Display in the Nefos Mobile app only records created by the current user created this year.
Standard or Custom Object	IsActive = true AND ProfileId <> '00eD00000012RNt'	Display in the Nefos Mobile app only records, where “Active” is set to true, and the ProfileId is not equal to



		'00eD00000012Rnt'.
Standard or Custom Object	CreatedDate = <code>THIS_QUARTER</code>	Display in the Nefos Mobile app only records created this quarter
Standard or Custom Object	CreatedDate > <code>LAST_N_QUARTERS:2</code>	Display in the Nefos Mobile app only records created in the last two quarters

In general, any expression which can be used in the WHERE clause of an SOQL query can be specified here. Additionally, we support the '\$currentUser' placeholder which will be replaced with the current User ID.

4.7 Configure icons for the fields

To set an icon, please enter the Icon name in the Icon field, in the Nefos Mobile Object- or Nefos Mobile Field definition. Go to the “Nefos Mobile Config” app in Salesforce, go to the Tab “Nefos Mobile Object”, select a Nefos Mobile Object, click on “Edit”, and enter the icon name. The list of all icons, which currently can be used in the app, can be found in Appendix 1)

NeMo Object Edit
NO-000004

[Help for this Page ?](#)

NeMo Object Edit

Information ! = Required Information

Name

Order

Show in menu ☒

Synchronize ☒

Icon

NeMo Object ID NO-000004

Owner nefos Dev

Sync Filter

Editable ☒

Createable ☒

Deletable ☒

Go to the “Nefos Mobile Config” app in Salesforce, go to the tab “Nefos Mobile Fields”, go to a Nefos Mobile Field, click on “Edit”, and enter an Icon.



NeMo Field Edit
Save Save & New Cancel

Information ! = Required Information

NEMO Field ID NF-000144

NEMO Object NO-000004

Name

Order

Icon

Section

Synchronize ☒

Main field ☐

Show in list view ☐

Editable ☒

Filterable ☐

Sortable ☒

Save Save & New Cancel

Screenshots of the available Nefos Mobile icons you can use are available at Appendix 1.

4.8 Using the Bulk Configurator

The Nefos Bulk Configurator allows you to create the initial configuration for the standard objects and fields and also custom objects and fields in your environment. Click on the NeMo Bulk Configurator Tab to open the Bulk Configurator Page:

NeMo Objects and Fields

Number of NeMo Standard Objects	8	Number of NeMo Standard Fields	106
Number of NeMo Custom Objects	1	Number of NeMo Custom Fields	36

Bulk Operations

Create Standard Objects and Fields

Creates NeMo objects and fields for all default standard objects and fields. Existing records will not be overwritten.

Create All Custom Objects

Creates all NeMo objects for all custom objects. Existing records will not be overwritten.

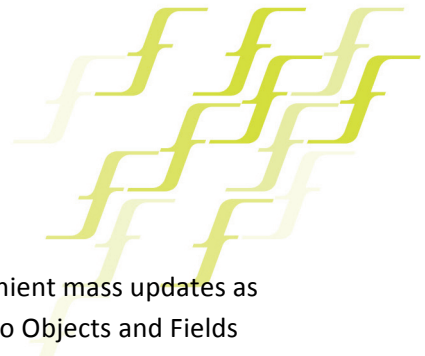
Create All Custom Fields

Creates NeMo fields for all custom fields for standard and custom objects. This is a batch job, and may take a while to complete. Existing records will not be overwritten.

Delete All Objects and Fields

Deletes all existing standard and custom objects and fields. This cannot be undone, use with caution!

This tab has 2 sections. The first section, “NeMo Objects and Fields”, displays the number of NeMo Objects and Fields that have already been setup in your org. If you have just installed the package, all numbers will be 0.

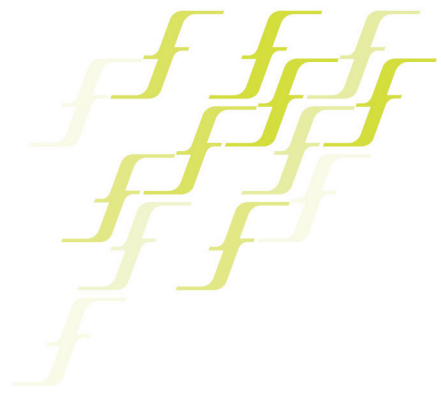


The second section, “Bulk Operations”, has 4 buttons that execute some convenient mass updates as part of the configuration tasks of NeMo. Since creating and configuring all NeMo Objects and Fields one by one, as described in the previous chapters, can be a tedious and daunting task, the bulk configurator offers you tools for achieving a working configuration in as painless a manner as possible. It is probably best practice to use the bulk configurator to quickly get Nefos Mobile going, and then do your tweaking manually, where necessary, as explained in the previous chapters.

- **Create Standard Objects and Fields:** Nefos Mobile comes with a default configuration for some of the most useful standard objects and fields. This default configuration is stored in external configuration files, which are part of the Nefos Mobile package, and are installed as static resources during the package installation process. Clicking on this button will set up Nefos Mobile with this standard configuration, which is a good starting point for using the app. This step will be automatically executed on the initial package installation.
- **Create All Custom Objects:** This button creates NeMo Objects for all existing custom objects in the org. The attributes “Editable”, “Creatable” and “Deletable” are set to TRUE by default.
- **Create All Custom Fields:** This button creates NeMo fields for
 - a) all custom fields of Standard Objects (for which NeMo Objects already exist)
 - b) all custom and standard fields of Custom Objects (for which NeMo Objects already exist)

The attributes “Editable”, “Filterable”, “Sortable” and “Synchronize” are set to TRUE by default. All fields are placed in Section “0” by default, and assigned a random order. The “Name” field of each custom object is marked as “Main Field”, and the first 3 custom fields for each custom object (according to the randomly assigned order) are marked as “Show in List View”.

- **Delete All Objects and Fields:** Deletes all NeMo Objects and Fields and gives you a clean slate so you can start afresh.

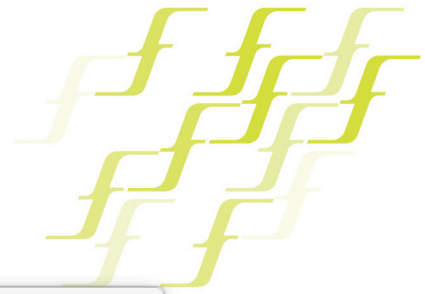


Appendix 1: Available Icons









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The Cloud Consulting Company®

